



Please complete this form to make a gift of securities to the Newport Beach Public Library Foundation.

Thank you for your generosity!

1. DONOR & STOCK INFORMATION

Donor's Name: _____

Street Address: _____

City, State, Zip code: _____

Home Phone: () _____ Cell Phone: () _____

Email: _____

Name of Broker and Brokerage Co: _____

Email: _____

Phone Number: () _____

of Shares: _____ Security Name: _____ Ticker Symbol: _____

2. GIFT DESIGNATION

Please check only one box below

General:

- Membership
- Unrestricted gift to be used for the Foundation's highest priorities.
- Other: Please designate this gift to the following specific program or project: _____

Is this gift fulfilling a previously made pledge to the NBPLF? Yes No

3. INFORMATIONAL PURPOSES ONLY

Beneficiary Name: Newport Beach Public Library Foundation

Tax ID: 33-0593010

Account Number: 4140-1516

Firm: Charles Schwab & Co.

DTC: 0164, Code 40



4: PLEASE SEND THIS COMPLETED STOCK GIFT FORM TO BOTH:

Zachary J. Cox
Investment Analyst
Canterbury Consulting
610 Newport Center Drive, #500
Newport Beach, CA 92660
(949) 718-2273
zjcox04@canterburyconsulting.com

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CEO
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Jkappel@nbplf.foundation

Newport Beach Public Library Foundation

funds valuable library resources, programs, services, and engages the community through the creation and sponsorship of diverse literary, cultural, and intellectual programs.

THANK YOU!

for supporting the NBPLF mission and making the Library accessible to all

Internal Use Only:

Transfer Information:

Date of Stock Transfer: _____

Value of Stock: _____

Sold Information:

Date Stock Sold: _____

Amount Transferred to NBPLF Account: _____